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QAP Express User Guide

Introduction

QAP Express is an online program that NMEDA has made available to all members for free to help with the following:

- Creating and editing QAP labels
- Creating and storing QAP required forms and checklists
- Maintaining documentation to meet audit requirements
- Maintaining QAP label record history
- Maintaining QAP Weight Analysis documentation

QAP Express training, support and documentation is provided at no charge to NMEDA members directly via email and telephone.

**QAP Express Support Contact Information:**

**Telephone:** 480-898-0100

**Email:** support@shopcontroller.com

**Support hours:** 6:00 AM through 4:00 PM PST, Monday through Friday

Program Installation

The QAP Express program is installed from a download link. To install the program for the first time, install the program on additional computer, please contact your QAP Express administrator or **QAP-14-Make Inoperative** ShopController support for a download link. Installation assistance is provided as needed.

Initial setup includes the following:

1. Download and install the QAP Express program.
2. Set up company and site information
3. Enter employees
4. All required QAP forms are included with the QAP Express program.
Common Components of the QAP Express Program

The Ribbon

The Ribbon is the menu bar that contains icons for common functions. The Ribbon controls apply to the currently selected tab in the Active pane.

Some Ribbon Icons have a drop-down arrow next to them or below them.

- Selecting the Icon opens the default option.
- Selecting the drop-down arrow shows a list of options. Clicking the icon selects the top option in the list.

Example: In the In Process Labels screen, selecting the New icon on the Ribbon creates a new Work Order.
Selecting the arrow under the Icon gives the option to create a new Work Order, a new Appointment, or a new Contact.
The Navigation Pane
The Navigation Pane allows you to go to different modules in the program. The Navigation Pane shows modules in a tree structure. The folders can be expanded or compressed by clicking the arrows to the left of the folders.

The Active Pane
The Active Pane is where you will view and make entries in the forms and lists such as the In Process Labels list pictured below.
User Guide Notes

- **QAP Express** can be viewed full-screen or in a sized window. To provide a more complete view in this document, components of the screen will be sized as appropriate for the material to be shown. **QAP Express** also allows various “Skins” to be applied to suit your taste. Your screen may not look the same due to the differences in sizing and Skin selection.

- There is a Ribon at the top of most screens when the **Home** tab is selected. If you do not see the **Ribbon**, check that the **Home** tab is selected.

- Some screens and windows have their own **Ribbon**. Typically, when an icon on the **Ribbon** is called out, it will be at the top of the screen. In other cases, the location will be noted. In any case, when a separate window opens, all controls for that function will be in the open window.

- Navigation references will be in this format: **Navigation** > **In Process Labels**. This tells you to go to the **Navigation** pane, open **In Process Labels**.
QAP Express User Guide

System Setup

Location Setup
This section covers the process for setting up QAP Express for your site, including general company information and employees.

Company Location

1. Go to Navigation > Settings > Admin Tools. This will open the Company Information entry form.

![Company Information Form](image)

Enter the following:

- **Company information** Name, address, and other Information for the company.

2. When the Company Information has been entered, click Save and Close.

![Save and Close Button](image)
Employee Setup

1. In the **Navigation** pane, select **Settings > Employees**. This will open the **Employee** listing for this location in the **Employee** tab.

2. To edit an existing employee, double-click the employee in the **Employee** list. Select **New** to add a new employee.

3. The **Employee** entry screen will open.
4. Enter the following required information:
   - **First Name:** Employee’s First Name
   - **Last Name:** Employee’s Last Name
   - **Position:** Employee’s Position
   - **User Name:** Employee’s User Name
   - **Is Active:** Check to make the employee active

Other fields are optional.

**Selecting an Employee Role**

1. Select **Link** to choose the **Role**. To remove a **Role** from the linked list, highlight the Category and select **Unlink**.

**Entering Employee Certifications**

1. If the employee has certifications to be entered, select the **Certifications** tab. This will open the **Certifications** list view.
2. In the **Certifications** list view, click **New**. This will open the **Certification** entry form.
2. Click the **Manufacturer**: drop-down list to select or add a new **Manufacturer**.

3. Enter the following:
   - **Certification Number**:
   - **Issue Date**:
   - **Expiration Date**:
   - **Certification File**:

4. Select **Link** to choose the **Category** or **Categories** for the **Certification**. To remove a **Category** from the linked list, highlight the Category and select **Unlink**.

5. Click **Save and Close** in the **Certification** form Ribbon.

6. If additional Certifications are to be added, click **New**, and repeat the process above.

7. When all **Certifications** for this **Employee** have been entered, click **Save** on the ribbon bar.
Entering or Changing a User Password

1. After Saving, click Reset Password (the key icon) on the ribbon bar.
   
   - To allow the user to create their own password, enter a temporary password and give it to the user. Change Password On First Logon will be checked automatically.

   - To create a permanent password for the user, enter the password and uncheck the Change Password On First Logon box.

   - For a user who will not log in to the system, (e.g. a technician who does not do data entry) leave the default password.

   ![Reset Password Dialog]

   **IMPORTANT:**
   For security, a password should be assigned for every new user, whether they will log in or not. If no password is assigned, the username can be used to log in without a password.

2. In the Login Info section, make sure the box for Change Password on First Logon shows the appropriate setting. If checked, the employee will be required to change the password the first time they log on to the system.

3. Make sure the Is Active box is checked to make the employee active in the system.

   ![Login Info Table]
4. Select **Save and New** to enter additional Employees, or click **Save and Close** to complete Employee entry.

**Category**
The **Categories** have been preset to work with the various forms and requirements of the **QAP** system.

**Note:** We strongly recommend that you **DO NOT delete or edit existing Category Settings**.

In the Navigation pane, go to **Settings > Category** to view **Category Settings**.

**Inspection Items**
The **Inspection** list is comprehensive, but items can be viewed, added, edited or deleted.

1. To view, add, edit or delete an **Inspection Item**, go to **Navigation > Settings > Inspection Items**.

   The **Service Inspection Item** list will open in the **Service Inspection Item** tab.

2. To view or edit an **Inspection Item**, double-click the line.

   To add a new **Inspection Item**, click **New**.

3. The **Inspection detail** form will open in the **Inspection Items** tab.
Fill in the following required fields:

- **Category** (drop-down) The Category of the Inspection Item
- **Description** A brief description of the Inspection Item

**Important:**
The **Category** is very important for pulling appropriate data into various forms. We discourage editing or deleting **Category** entries, as this may lead to incorrectly populated forms. If your category isn’t available, please contact **NMEDA** to inquire about adding a category.

4. When the Inspection item has been completed, click **Save and Close** or click **Save and New** to create additional Inspection items.

**Make Inoperative Items**
The Make Inoperative Items list is comprehensive, but items can be viewed, added, edited or deleted.

1. To view a Make Inoperative Item, go to Navigation > Settings > Make Inoperative Items.

The **Make Inoperative Items** list will open in the Make Inoperative Item tab.
2. To view or edit a **Make Inoperative Item**, double-click the line.

   To add a new, **Make Inoperative Item**, click **New**.

3. The **Make Inoperative Item detail** form will open in the **Make Inoperative Items** tab.

   Fill in the following required fields:
   - **Category** (drop-down) The Category of the **Make Inoperative Item**
   - **Description** A brief description of the **Make Inoperative Item**

   **Important:**
   The **Category** is very important for pulling appropriate data into various forms. We discourage editing or deleting **Category** entries, as this may lead to incorrectly populated forms. If your category isn’t available, please contact **NMEDA** to inquire about adding a category.

4. When the Inspection form has been completed, click **Save and Close** or **Save and New**.

**Service Inspection Items**

**Service Inspection** is the final inspection before releasing the vehicle to the customer. It is typically used to check the integrity of the various systems in the vehicle.

**Service Inspection Item** list items can be viewed, added, edited or deleted.

5. To view, add, edit or delete a **Service Inspection Item**, go to **Navigation > Admin Tools > Settings > Service Inspection Items**.
The Service Inspection Item list will open in the Service Inspection Item tab.

6. To view or edit a Service Inspection Item, double-click the line. To add a new Service Inspection Item, click New.

The Service Inspection Item detail form will open in the Inspection Items tab.

7. Fill in the following required fields:
   - **Item**  A brief description of the Service Inspection Item
   - **Sort**  The list sort position number for the Service Inspection Item
   - **Grouping**  A group number for top-level sorting of the Service Inspection Item

8. Click Save and New to add additional Service Inspection Items, or click Save and Close.
Assigning a QAP Label
This section demonstrates the process of assigning a QAP Label in QAP Express.

1. Select Navigation > In Process Labels. This will open the In Process QAP Labels listing.

2. Select New to start a new QAP Label.

QAP Label Flow
At any given time, a QAP Label can be in any of 4 stages, determined by the Status selected. To change the Status of a Label, select the Status from the Status drop-down list and click Save, Save and New, or Save and Close.

Work Flow Stages by Status:
- **In Process** This is the preparation and work stage.
- **Review** Label is complete, waiting for review by higher level management.
- **Completed** A Completed Label is finalized, and no longer editable.
- **Delete** Deleted labels are retained in Navigation > Deleted Archive

**IMPORTANT:** When a Label/work order is saved with the Complete Status selected, the QAP-F25 Label Reporting Form is automatically sent to the third-party audit firm.
QAP Label Info

3. A new Label will open to the QAP Label Info tab.

4. In the QAP Label Info tab, enter the following general information about this label:

- **Label**: Select a NMEDA label number or enter a new label
- **Status**: Defaults to Inspect Vehicle (Initial vehicle inspection)
- **Contact**: Select a customer or enter a new customer from the dropdown list box. See Entering a New Customer for more information on entering a new customer.
- **HDVehicle**: Select a vehicle or enter a new vehicle from the dropdown list. See Entering a New Vehicle for more information on entering a new vehicle.
- **Odometer**: Optional.
- **Label Work Order Number**: The system will automatically enter this information
- **Completed Date**: The system will automatically enter this information
- **Date Created**: The system will automatically enter this information. Date Created can be edited.
- **Service Writer**: Select the employee from the drop-down list
- **Tech**: Select the employee from the drop-down list
5. When the QAP Label Info has been entered, click **Save**.

   ![Save button]

   **Save**

**Equipment List**

6. Select the **Equipment List** tab to enter the equipment in the QAP Label/Work Order.

   ![Equipment List table]

<table>
<thead>
<tr>
<th>Equipment</th>
<th>Category</th>
<th>Quality</th>
<th>Serial Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transfer Seat 4-Way</td>
<td>ADAPTIME SEATING</td>
<td>New</td>
<td></td>
</tr>
</tbody>
</table>

   ![New button]

   **New**

   This will open the **Part Detail** screen.

7. Click **New** in the **Equipment** section to add new Equipment (Parts).
QAP Express User Guide

8. Parts can be entered in two different ways:

   a) To enter an **Inventory Part**, select the **Inventory Part** field. This will open a drop-down list of inventory parts.

   i) To search the list of **Inventory Parts**, enter one or more search terms in the **Search** box and press the **Enter** key. (The search box appears when the list is full.)

   For multiple search terms separate the terms with a space. To view the full list press the **Enter** key.

   (1) Select the part you want from the list to enter it into the **Part Detail** screen.

   (2) In the **Part Detail** screen, enter the **Sell Quantity** and any other information you would like to add.

   ii) To add a new **Inventory Part**, click **New**.
This will open the Inventory Part Detail window.

<table>
<thead>
<tr>
<th>Inventory Part Detail</th>
</tr>
</thead>
<tbody>
<tr>
<td>Part Number:</td>
</tr>
<tr>
<td>Name:</td>
</tr>
<tr>
<td>Part Description:</td>
</tr>
<tr>
<td>Part Category:</td>
</tr>
<tr>
<td>Manufacturer:</td>
</tr>
<tr>
<td>Part Condition:</td>
</tr>
<tr>
<td>Service Type:</td>
</tr>
<tr>
<td>Quality:</td>
</tr>
<tr>
<td>Weight:</td>
</tr>
</tbody>
</table>

(1) Enter the following fields:

(a) **Part Number**  Part Number (Must be unique)
(b) **Name**  Part Name
(c) **Part Description**  (Optional)
(d) **Part Category**  Select Part Category
(e) **Manufacturer**  (Optional)
(f) **Part Condition**  New (Aftermarket), OEM
(g) **Service Type**  (optional)
(h) **Quality**  New, Reman, Used
(i) **Weight**  (Optional)
(j) **Active Part**  Check if Active

**Important:**
The **Category** is very important for pulling appropriate data into various forms. We discourage editing or deleting **Category** entries, as this may lead to incorrectly populated forms. If your category isn’t available, please contact **NMEDA** to inquire about adding a category.

(2) When **Inventory Part** entry is complete, click **Save and Close**.
b) To enter a non-inventory part, leave the **Inventory Part** field blank and fill in the fields below:

- **Part Number:** (Required) A unique part number for this part
- **Part Name:** (Required) Your name or the MFG name for the part
- **Description:** (Optional) Part description or other relevant information
- **Manufacturer:** (Optional) Select from the drop-down list
- **Part Category:** (Required) The category populates many of the QAP tabs.
- **Part Type:** (Optional) OEM or Aftermarket
- **Part Quality** (Optional) New, Reman, Used
- **Service Type** (Optional) Recurring maintenance items e.g. oil change
- **Serial Number** (Optional)
- **Weight** (Optional)
- **Sell Quantity** (Required)
- **Cost Per Unit** (Optional)
- **Sell Price** (Optional)
- **Discount** (Optional)

**Important:**
The **Category** is very important for pulling appropriate data into various forms. We discourage editing or deleting **Category** entries, as this may lead to incorrectly populated forms. If your category isn’t available, please contact **NMEDA** to inquire about adding a category.
9. To enter additional Parts, click Save and New.

Save and New

Save and Close

10. Once all parts have been entered, click Save and Close.

Save and Close

The parts entered will now be displayed in the Equipment List.

11. Click Save and Close to save the information entered and close the Equipment list.

Save and Close

Note: Status, Label Work Order #, and Date Created will automatically populate.

QAP-F23 Final Inspection

12. This screen displays the items to be inspected. The Final Inspection checklist will be provided to you based on the part categories selected within the Equipment section. These are the inspection items necessary to fulfill the inspection process. There are 5 columns, Install, Fail, Pass, NA, and Defect Notes. If the vehicle that is being inspected as a pass through and has any equipment failures, the Defect noted option can be used to enter notes on the failures. The checkboxes and notes will transfer over to the printable forms.

QAP-F14 Make Inoperative
13. In the Make Inoperative Information, select those options that are appropriate. The Make Inoperative entry area includes selections for the following options:

- Driver Modification
- Passenger Modification
- Make Inoperative Label location
- Load Carrying Capacity
- Client Mobility Aid Weight

Select which options apply to the vehicle modification. The make Inoperative items will be listed in the menu based on the part category selected in the equipment area.

QAP-F30 Four Corner Weight Analysis

Weight Analysis Form

14. For the Vehicle and Client Information, enter all appropriate information. The Four Corner Weight Analysis tab has a Weight Analysis Form to enter Vehicle Information and Pre-Modification and Post-Modification scale weights. This feature will do the calculations and show the offsets based on the GVWR and GAWR of the vehicle selected and equipment entered into the system. If the Post-Modification calculated values are out of specified ranges, the out-of-limit items will be colored red.
These sections will automatically populate and cannot be edited.

15. This screen displays inspection items. The Service Inspection Checklist documents the status of several items on the vehicle. The checkbox entries print on the Service Inspection Checklist form.

QAP-F33 Servicing Agreement
(Optional) This document is only used when a vehicle is sold outside the dealer’s service area.
16. This screen displays the **Servicing Agreement**. Complete only **Part A** or **Part B**, whichever applies.

If the dealer is planning to service the client with consent outside the service area, the dealer should check **Part A** and enter their dealer name.

<table>
<thead>
<tr>
<th>Part A</th>
<th>Part B</th>
</tr>
</thead>
<tbody>
<tr>
<td>□ Part A - The NMEDA QAP accredited service facility listed below agrees to service the mobility equipment installed by the selling dealer shown on this form in accordance with the NMEDA QAP Membership Rules.</td>
<td>□ Part B - One or the three conditions outlined below are true. Place a check mark in the box to indicate which of the three conditions apply and complete the form as necessary. All three boxes (1-3) must be checked.</td>
</tr>
<tr>
<td>Servicing Facility Name:</td>
<td>□ There is no NMEDA QAP accredited facility within 100 miles (160 km) or 3hr driving distance from the customers location (without crossing international borders).</td>
</tr>
<tr>
<td>□ Part A - None of the accredited facilities contracted <strong>Non technician(s)</strong> certified to repair/service all of the mobility equipment installed by the selling dealer.</td>
<td>□ Closest NMEDA QAP accredited facility approximate miles:</td>
</tr>
<tr>
<td>□ Closest NMEDA QAP accredited facility approximate hours:</td>
<td>□ Closest NMEDA QAP accredited facility approximate hours:</td>
</tr>
<tr>
<td>□ Closest Non-NMEDA QAP accredited facility approximate miles:</td>
<td>□ Closest Non-NMEDA QAP accredited facility approximate hours:</td>
</tr>
</tbody>
</table>

**QAP-F24 Final Acceptance Form**

17. This screen shows the items that have been completed as necessary for delivery of the vehicle. Check the options that apply to the vehicle and modifications that have been inspected or completed.

**Acceptance Items Checklist**

Reference QAP Rules section V, and Guidelines section IV.

The following items have been completed and are on file:

- □ Customer's contact information is provided
- □ A work order has been completed that includes it
- □ Final vehicle and adaptive equipment inspection
- □ Final client fitting was completed (if applicable)

18. Click **Save**.

   ![Save Icon]

   **Save**
   This enables the **Show in Report** icon.

**Signature Acceptance**

(Optional) This feature is only used when you have the required electronic signature device to capture the signatures of your customers. The captured signature will be applied to every document requiring a signature from your customer so it will eliminate the need for them to sign each form individually.
To view or print a QAP document, select the down arrow under the Show in Report Icon.

A dropdown list of available QAP documents will appear.

Select a Report to View and/or Print.

When all entries have been completed in the QAP Label, click Save and Close

Entering a New Customer

Typically, customers are entered during the process of creating a QAP Label/work order, but customers can be entered and edited in the Customers section as well.
1. From the Navigation pane, select Customers. This will open the customer listing.

![Customer Navigation Pane]

2. Click New on the ribbon bar.

![New Button]

This will open the option to enter the contact information.

3. Enter the following information:

- First Name
- Last Name
- Address
- City
- State
- Zip

4. Select the date. Enter any notes for this contact.

![Contact Information]

---

**Entering a New Vehicle**

Typically, vehicles are entered during the process of creating a QAP Label/work order, but vehicles can be entered and edited in the Vehicles section as well.

1. From the Navigation pane, select Vehicles. This will open the vehicle listing.
2. Click **New** in the ribbon bar to enter a new vehicle.

3. New **Vehicles** can optionally be looked up either of 2 ways:
   - **Carfax Vin Lookup** searches for the VIN number entered
   - **Carfax Plate Lookup** searches for the Plate number and State

4. To look up a vehicle by **Plate**, enter the vehicle license plate number and select the state.

5. Click **Decode Plate** in the ribbon bar. This will populate the vehicle information.

Once a valid Plate and State have been entered, **Carfax Report** can be selected. This pulls up a **Carfax Service History Report** for this vehicle in the default Browser.

6. Additional information entry in this section for the vehicle is optional.

7. In **Vehicle Features** entry box, enter and/or select the appropriate information for the vehicle.
8. Once all the information has been entered, click **Save and Close** on the ribbon bar. This will save all the information entered and close the screen.
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Reports
To view or print a report from within a QAP Express Work Order, select
These are the report options for QAP. The information entered, will be automatically populated into these reports.

NMEDA Label Reporting Form
(Partial Report Shown)
QAP-14- Make Inoperative Disclosure Form  
(Partial Report Shown)  
**Note:** Not required in Canada

![Make Inoperative Disclosure Form](image)

QAP-F22-Service Inspection Checklist Report  
(Partial Report Shown)

![Vehicle Service Inspection Checklist](image)
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QAP-F23-Final Inspection Report
(Partial Report Shown)

![Vehicle Final Inspection Checklist]

QAP-F24-Final Vehicle Acceptance Report
(Partial Report Shown)

![Vehicle Final Acceptance]
QAP-F30-Four Corner Weight Analysis Report
(Partial Report Shown)

<table>
<thead>
<tr>
<th>Four Point Scale Weight Calculation Form</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dealer/Modifer Name: Test Company</td>
</tr>
<tr>
<td>Customer Name: Bob Hope</td>
</tr>
<tr>
<td>Make, Model: 2014 DODGE GRAND CARAVAN SXT</td>
</tr>
<tr>
<td>VIN: 1GN8877DVM230D5</td>
</tr>
<tr>
<td>Vehicle Curb Weight (All weights in pounds)</td>
</tr>
<tr>
<td>PRE-Modification Vehicle Weight (without powermobility device)</td>
</tr>
<tr>
<td>PRE-Modification Vehicle Weight</td>
</tr>
</tbody>
</table>

QAP-F33-Servicing Agreement Report
(Partial Report Shown)

<table>
<thead>
<tr>
<th>NMEDA QAP SERVICING AGREEMENT FORM</th>
</tr>
</thead>
<tbody>
<tr>
<td>Selling Dealer Name: Test Company</td>
</tr>
<tr>
<td>Vehicle Year/Make/Model: 2014 DODGE GRAND CARAVAN SXT</td>
</tr>
<tr>
<td>Customer Name: Bob Hope</td>
</tr>
<tr>
<td>City, State, Province, Zip: Mesa, AZ 85205</td>
</tr>
<tr>
<td>VIN: 1GN8877DVM230D5</td>
</tr>
</tbody>
</table>

No index entries found.

End of the QAP Express User Guide